Bi-Weekly Agency Sales Meeting

2023 Rotating Calendar

2022 Archive Slides

Google
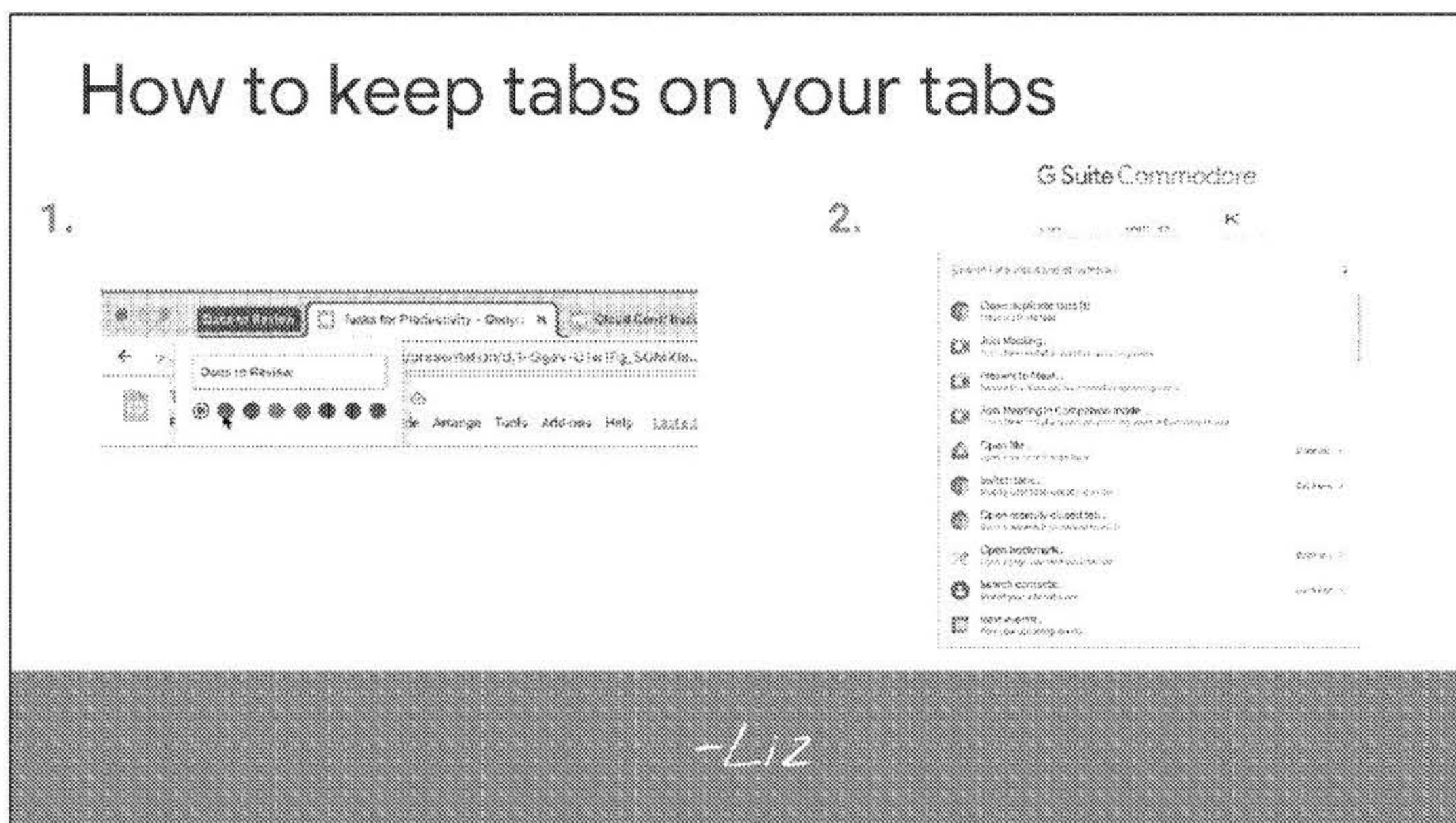
PTX1669

1:23-cv-00108

Bi-Weekly Agency Sales Meeting

IFG

March 27th, 2022

[Cori]

How to keep tabs on your tabs

Clean your space, clear your mind

Group tabs: Even when you pin tabs do you have too many things open? Need a way to group your tabs together to make them easily accessible and visible? Have some tabs open about one project and another set of tabs on a completely different topic? Easily organize and group tabs in Chrome!
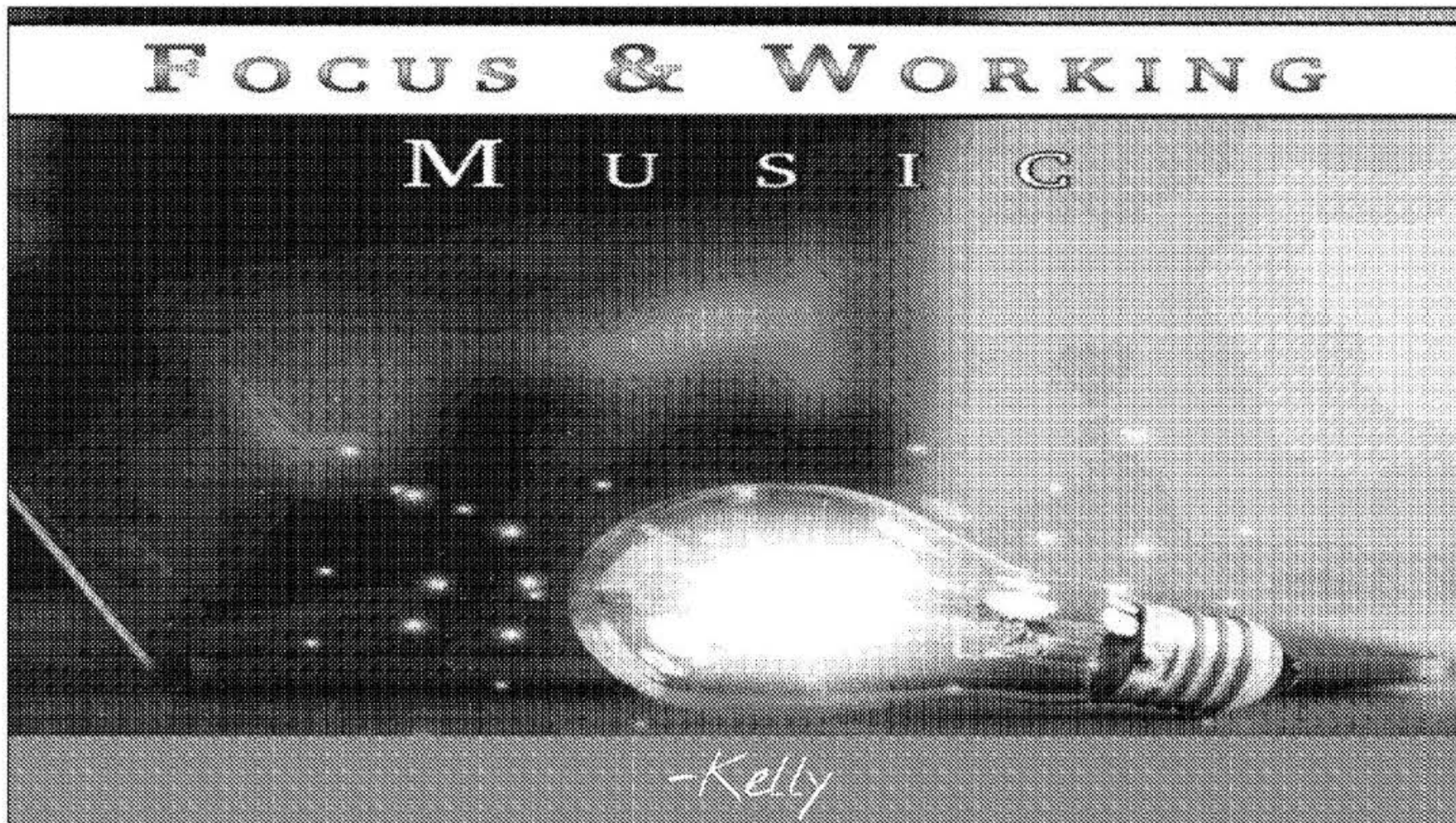
How to use: In Chrome, right click on a tab you want to organize. From there, create a new tab group (or add to an existing tab group). Once you've grouped tabs you can change group colors, click tab group names to expand and collapse those tabs, and even move a tab group to its own window.

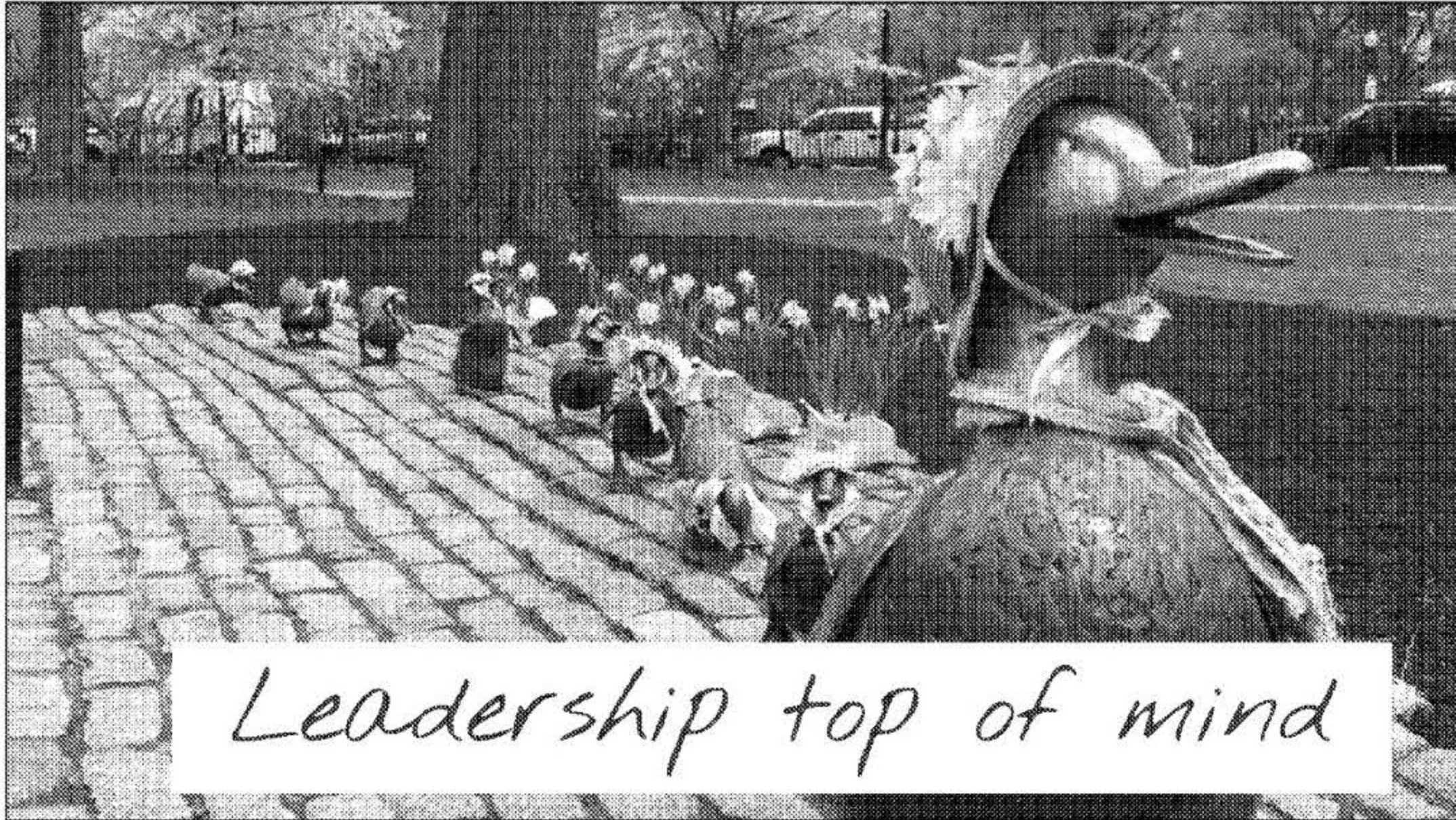Hat tip to Sarah Thomas-Pollack whoturned me onto Commodore: Allows you to quickly pull up a menu of tasks you may repeat regularly and connect you to the relevant action or Google products
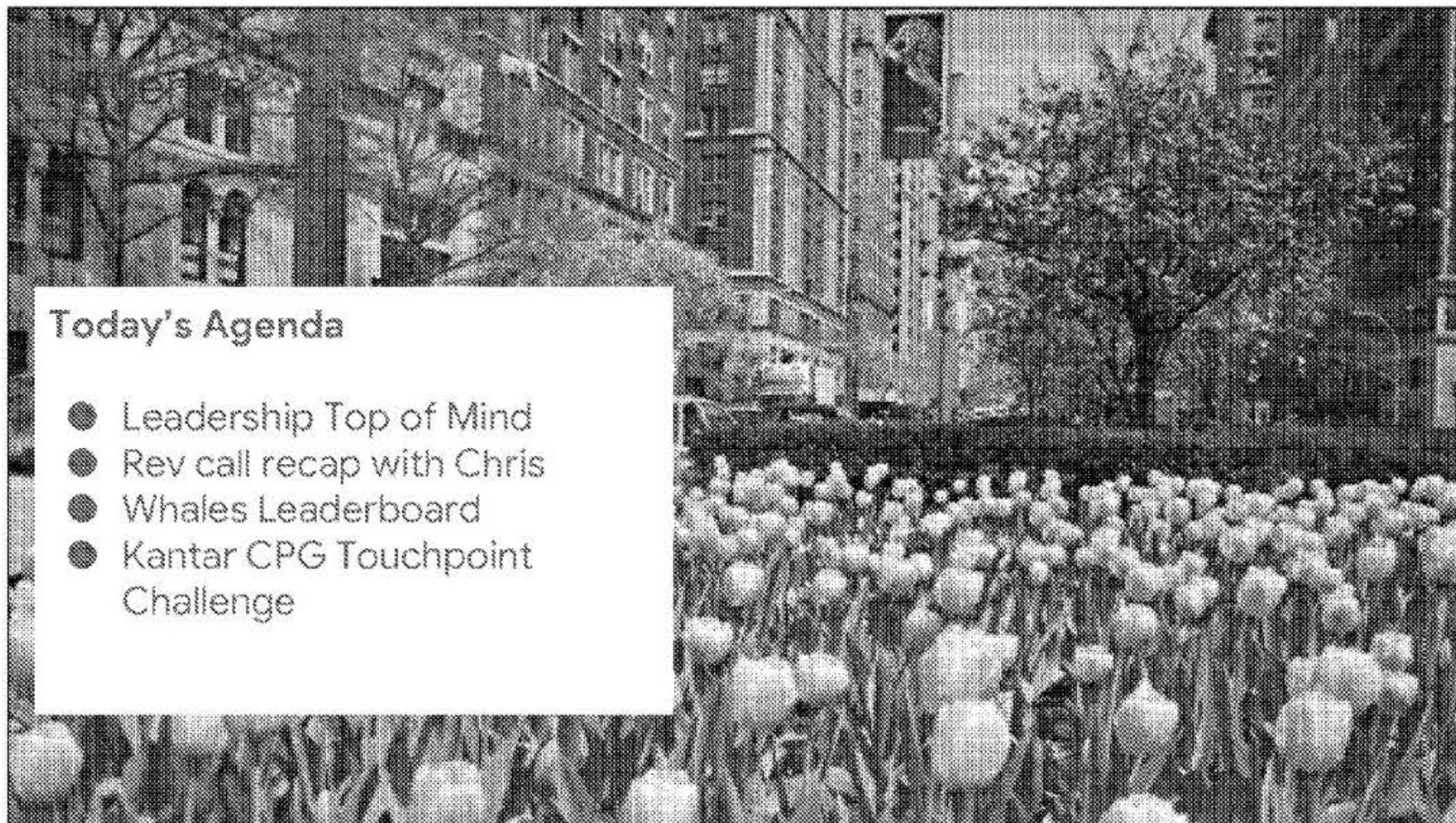
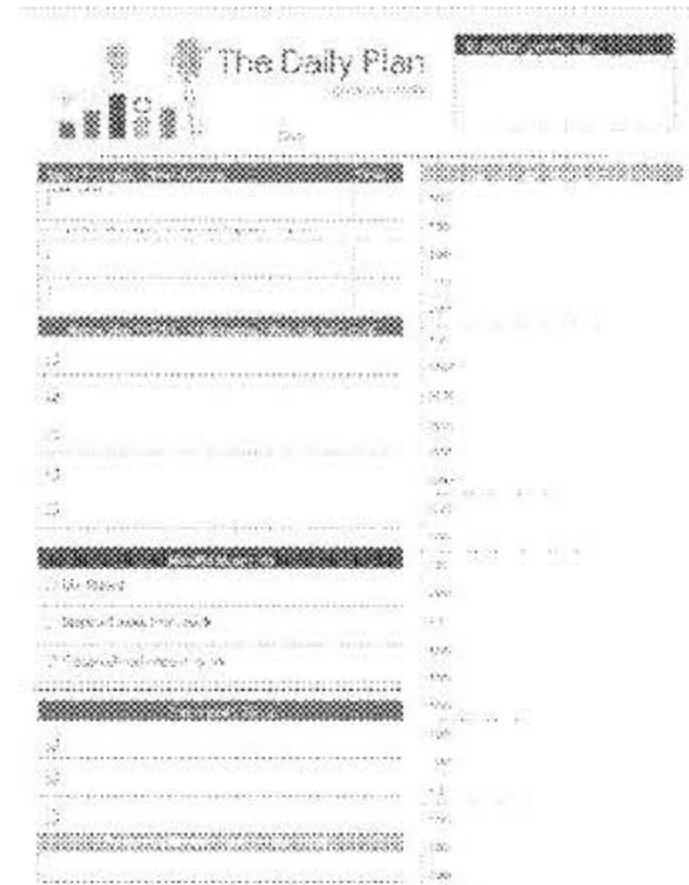**Today's Agenda**

- Leadership Top of Mind
- Rev call recap with Chris
- Whales Leaderboard
- Kantar CPG Touchpoint Challenge

FOCUS & WORKING MUSIC

-Kelly

Leadership top of mind

GOOG-AT-MDL-008285897

Rev Call Recap

Extra Hack: go/getfaces

—Jeff
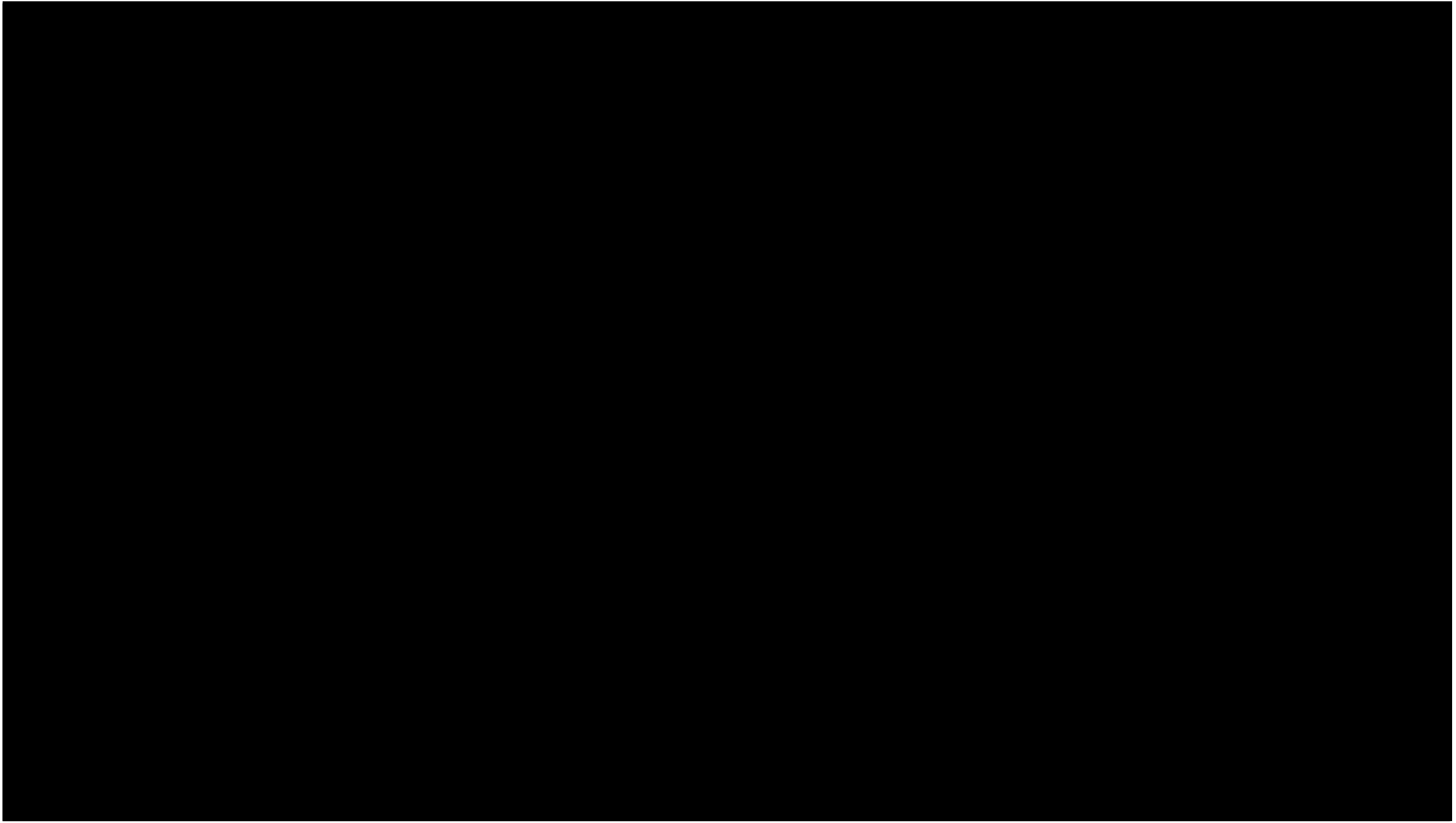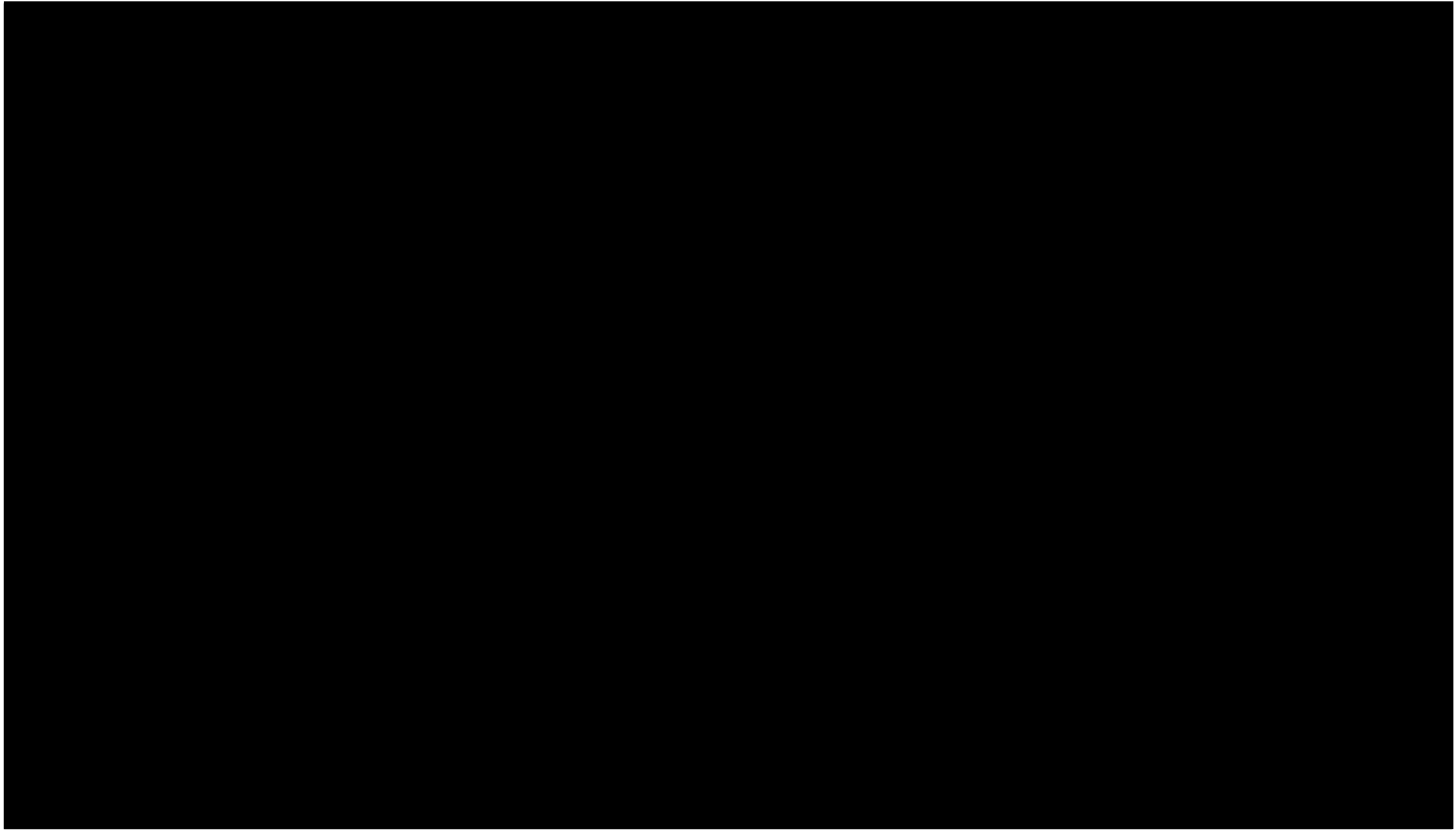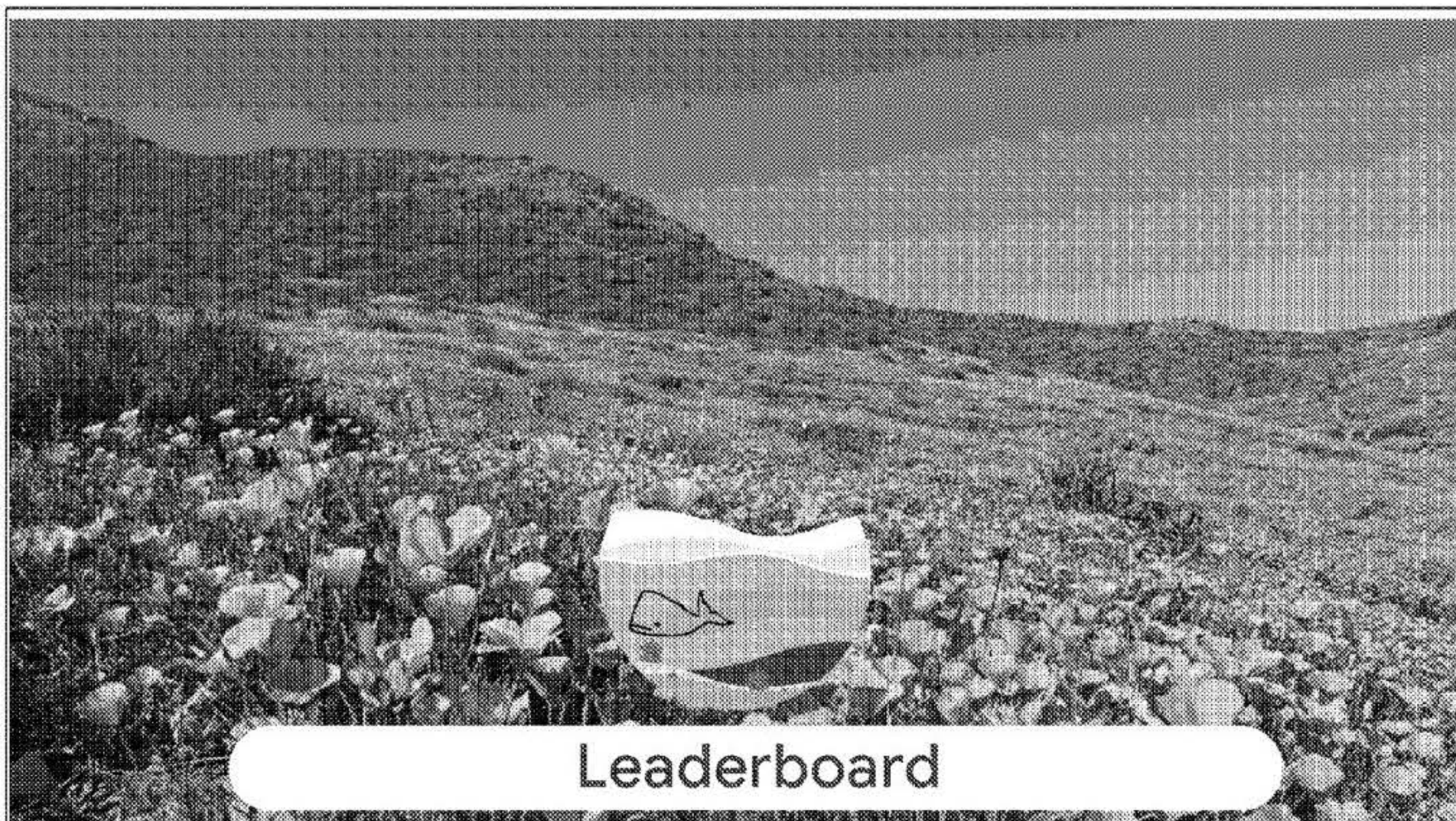
Top Whales at a Glance (as of 3/22)

What are you doing/how are you providing impact for SEARCH and VIDEO? What do you need?

ASK IF you have a whale on the slide: this is a VERY light lift/ask of you, we would like some of you to share in the meeting in 1-2 minutes thoughts on the below prompt:

What are you doing / what have you done in this last month for scrappy opportunities?
As you heard frm Chris, we have opportunities to continue momentum coming off of the strongest week int headquarter

Building Blocks in Google Docs

-Tom

To be updated: how to leverage this intel

①

②

③

Consumer Journey

Power of Google and YouTube together as a must win combination in the CPG shopper journey

Defend Search

Importance of Google in influencing online and offline sales for CPG, and compared to retail.com search

Retail Media

Strengthen Retail Media and Omnichannel pitches and narratives

GROW & ENHANCE AGENCY AND CUSTOMER RELATIONSHIPS

Google | **KANTAR** | US

GOOG-AT-MDL-008285906

What we set out to learn

Understand how consumers shop and research CPG, and measure Google's role and impact on purchase decisions across the shopper journey.

Key Questions:

- How are consumers purchasing CPG across online and in-store?
- Is CPG a heavily researched category? How are consumers researching across top CPG categories?
- What is the usage and influence of Google and various touch points on purchase behavior across the shopper journey? When compared to retailer.com and social channels?
- How can CPG brands contextualize their products further to increase brand visibility in moments that matter to shoppers?

Google | **KANTAR** | US

There has been no lack of headlines on the rise of eCommece, the increasingly complex shopper journey, and the rise of Retail Media networks (and retail media "search"). What has been lacking is the true valuation of Google within the evolved shopper journey, especially for CPG where clients still hypothesis the category as being low involvement where consumers are not researching.

We set out on this journey with Kantar to understand how consumers shop CPG and the role of Google in the shopper journey, and when compared to social and those retail media networks owning the Commerce headlines for CPG in particular.

Due to the vast nature of the CPG category, we split the shoppers into 4 major subcategories, to get a deeper understanding of purchase behaviors in these subcategories and how they vary.
This report summarizes key insights across categories, with product-level callouts where meaningful. All results are available at a category level upon request.
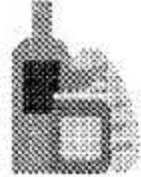
We interviewed more than 2,000 CPG shoppers in Q1 2023 to decode research and purchase behaviour (Full methodology here)

Beauty & Personal Care

Household Essentials

Food & Beverages

Health & Wellness

Google partnered with Kantar to leverage a proven and validated framework to assess in-category shopping behaviour. Online interviews were administered in January 2023 in the US.

Google | KANTAR | US

Due to the vast nature of the CPG category, we split the shoppers into 4 major subcategories, to get a deeper understanding of purchase behaviors in these subcategories and how they vary.
This report summarizes key insights across categories. We do have sub-category breakouts that are available in the appendix and additional product cuts may be available upon - eg want to isolate Baby care which has products across all categories.

Specific players used for comparison purposes are Google, YouTube, Tiktok, Meta, Kroger, Amazon, WMT, Target, and Instacart.

·········· Executive Summary

Key Insights of CPG Shopper Behavior

1   Growing preference for buying online signals omnichannel as a growth driver for CPG
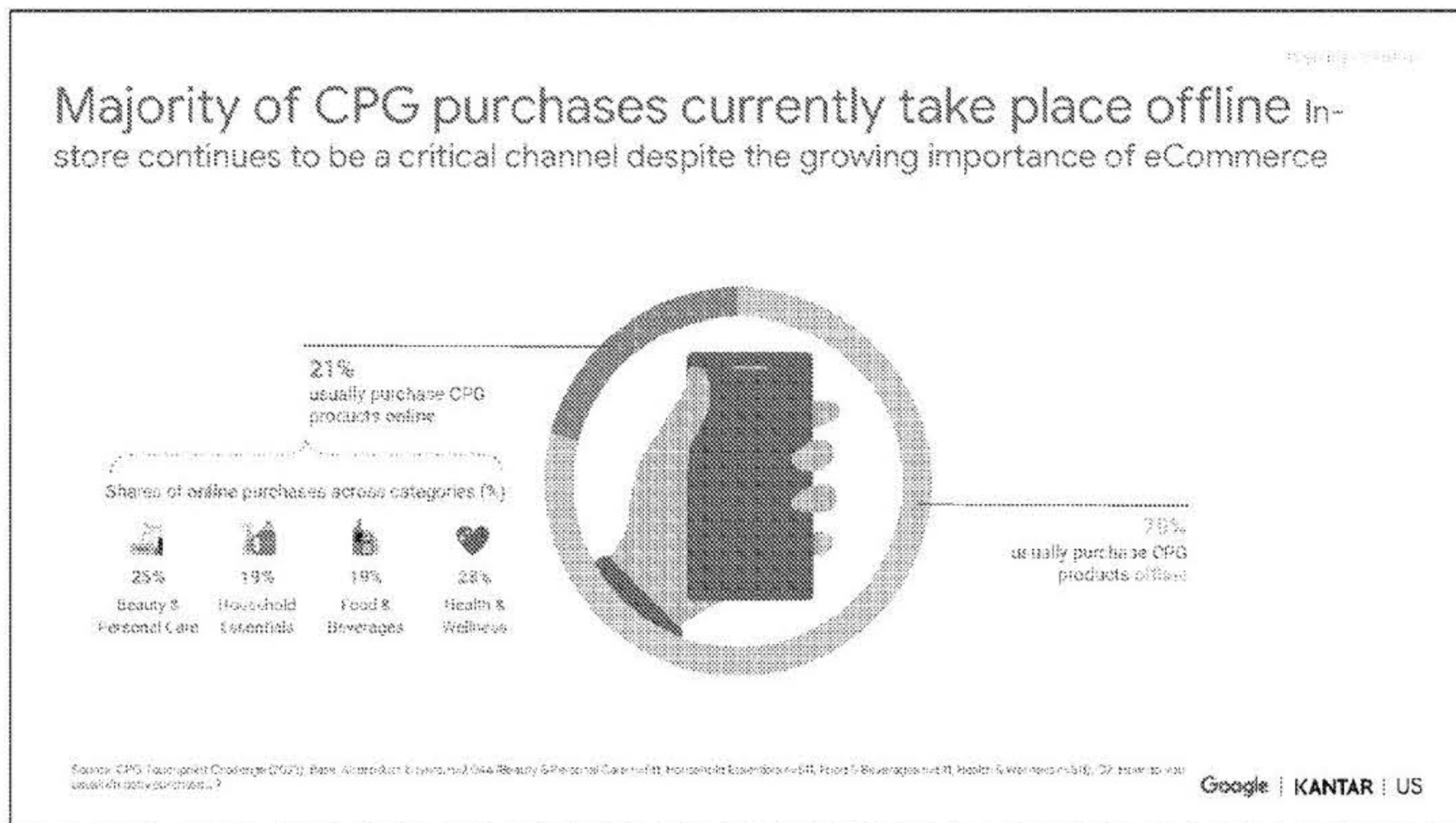   While 79% of consumers purchase consumer packaged goods in-store, only 61% prefer to do so

2   CPG shoppers with high brand affinity research and buy more online, with Google and YouTube being top online information sources
    85% of high affinity CPG shoppers research online compared to 71% for low/medium brand affinity shoppers; Shoppers turn to Google 80% more than Amazon for information; YouTube ranks #2 in importance among younger consumers (behind Google)

3   Shoppers fluidly navigate between touch points throughout the CPG shopper journey with Google as the gateway to online and offline purchases
    More shoppers made a purchase at a physical store or online retailer *after visiting Google*, when compared to Amazon and Walmart

Today we will focus on 3 key insights -
Preference for buying CPG online is growing however brands should focus on an omnichannel strategy, not just eComm one
CPG is heavily researched, and level of research is not tied to a specific category but rather whether or not consumers have high brand affinity - and spoiler alert, Google is THE top information source
Shoppers fluidly navigate between online and offline touchpoint, relying more on online touchpoints. Not only is Google search the most used information source, it is also the most influential one driving more online AND offline sales actions when compared to Amazon. And YouTube more influential than other social channels, esp among younger consumers (where it ranks #2 in influence, behind Google)

Majority of CPG purchases currently take place offline In-store continues to be a critical channel despite the growing importance of eCommerce

21%
usually purchase CPG products online

Shares of online purchases across categories (%)

25%	19%	19%	28%
Beauty & Personal Care	Household Essentials	Food & Beverages	Health & Wellness

79%
usually purchase CPG products offline

Google | **KANTAR** | US

Despite the continued growth of eComm as a sales channel, almost 80% of shoppers usually purchase CPG instore making it a must win channel.

GOOG-AT-MDL-008285910
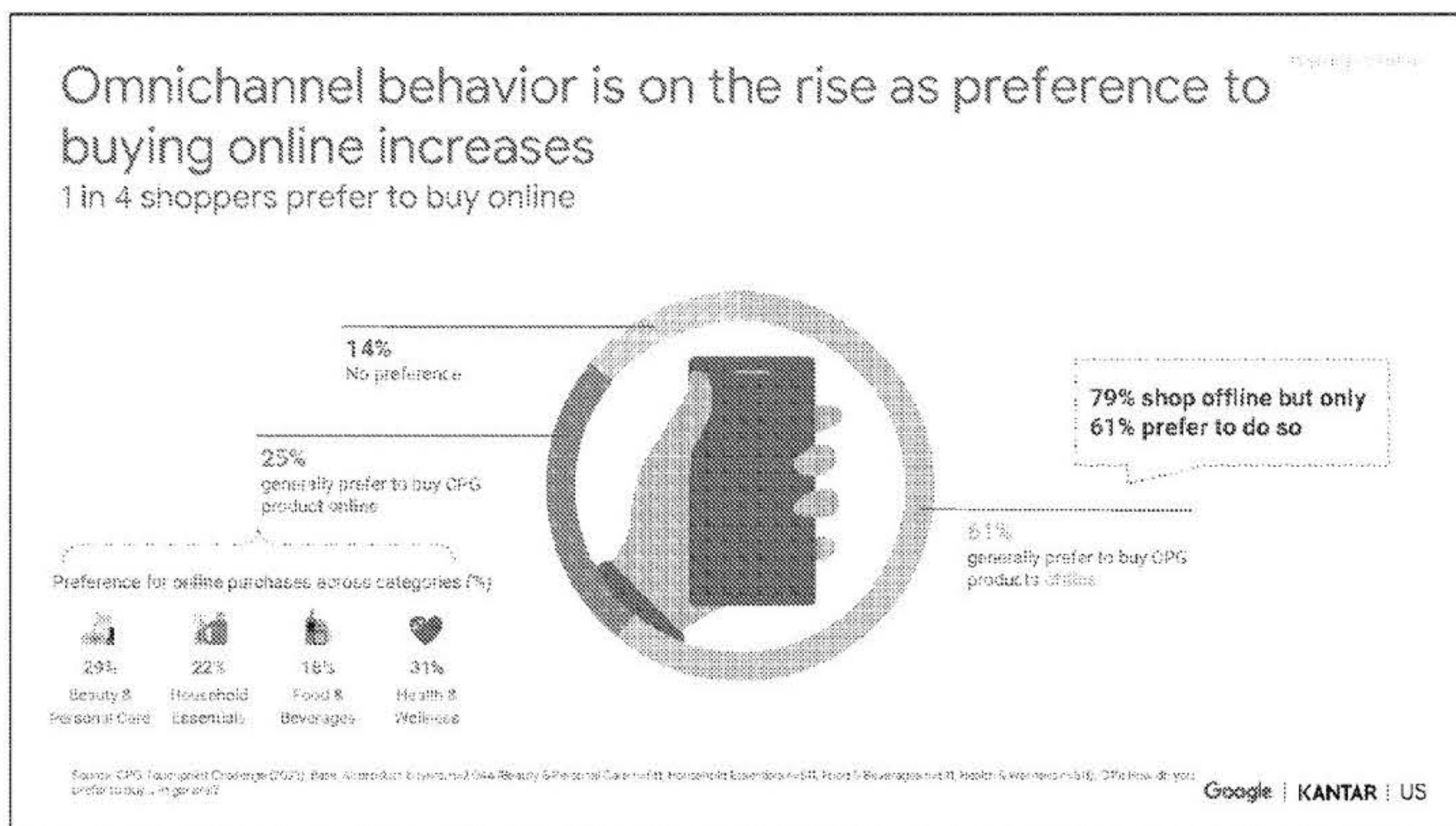
However preference to shopping more online is growing; while 79% usually buy CPG instore, only 61% prefer to.
We continue to see the continued preference to shop whenever and wherever - the lines between online and offline are becoming increasingly blurred for shoppers who prioritize convenience, value, and experiences. Many marketers continue to be organizationally siloed between online and offline, and missing out on the total sales opportunity; Omnichannel customers spend 7X more than online only shoppers and 3X instore shoppers.

We found that brand affinity plays a role on how much shoppers are researching online.   Affinity refers to the importance of buying a specific brand or product. Categories and/or products with high brand affinity are researched more - 85% vs 71% for low affinity products.   Affinity also correlates with numbers of touchpoints used and share of online purchases.   High affinity shoppers are invested in discovery and learning more, and more likely to complete a purchase online once they find what they need.

High involvement shoppers more likely to explore and try a new brand

Products with higher brand affinity also have a higher share of impulse purchases as well increased likelihood of trying a different product. This demonstrates the importance of meaningfully showing up when shoppers are researching - whether it is discovering new trends, a creator sharing their favorite tips and products, or searching for products that meet a specific need.

GOOG-AT-MDL-008285913

Let's look at an example: Beauty & Personal Care products

In Beauty & Personal care category, shoppers for Beauty tech and skin care are highly involved & researching their purchases 90% of the times, while shoppers for nail care and oral care are less involved and research their purchases 67% of the times

Level of Research done: 90%   Average: 81%   67%

Beauty tech and tools* | Skin care | Baby bath & body* | Fragrances | Anti-Aging* | Shaving & grooming | Facial care | Bath & body | Makeup | Hair care | Oral care | Nail care products*
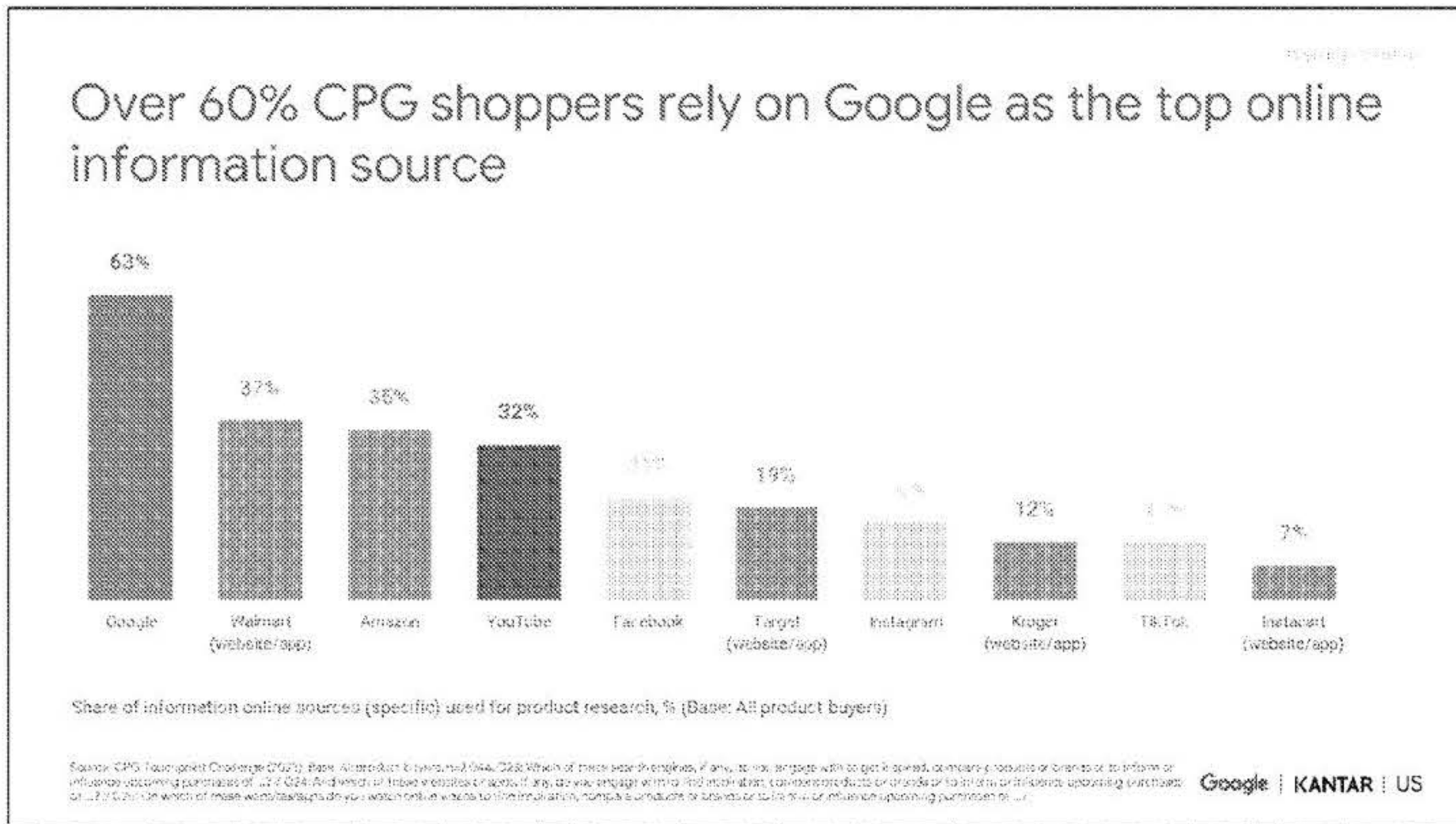
So lets look at an example - we were able to plot brand affinity across products. Here is a view for B&PC - the bottom has all sub-categories and level of affinity. Beauty tech and tools has the highest brand affinity reported (90% research) while nail care has the lowest (67%).

It is important to not correlate low brand affinity to no research being done. While lowest comparable affinity, 67% still research nail care.   But you can see how you can use this information to stress the importance of prioritizing the role of research across the B&PC spectrum.
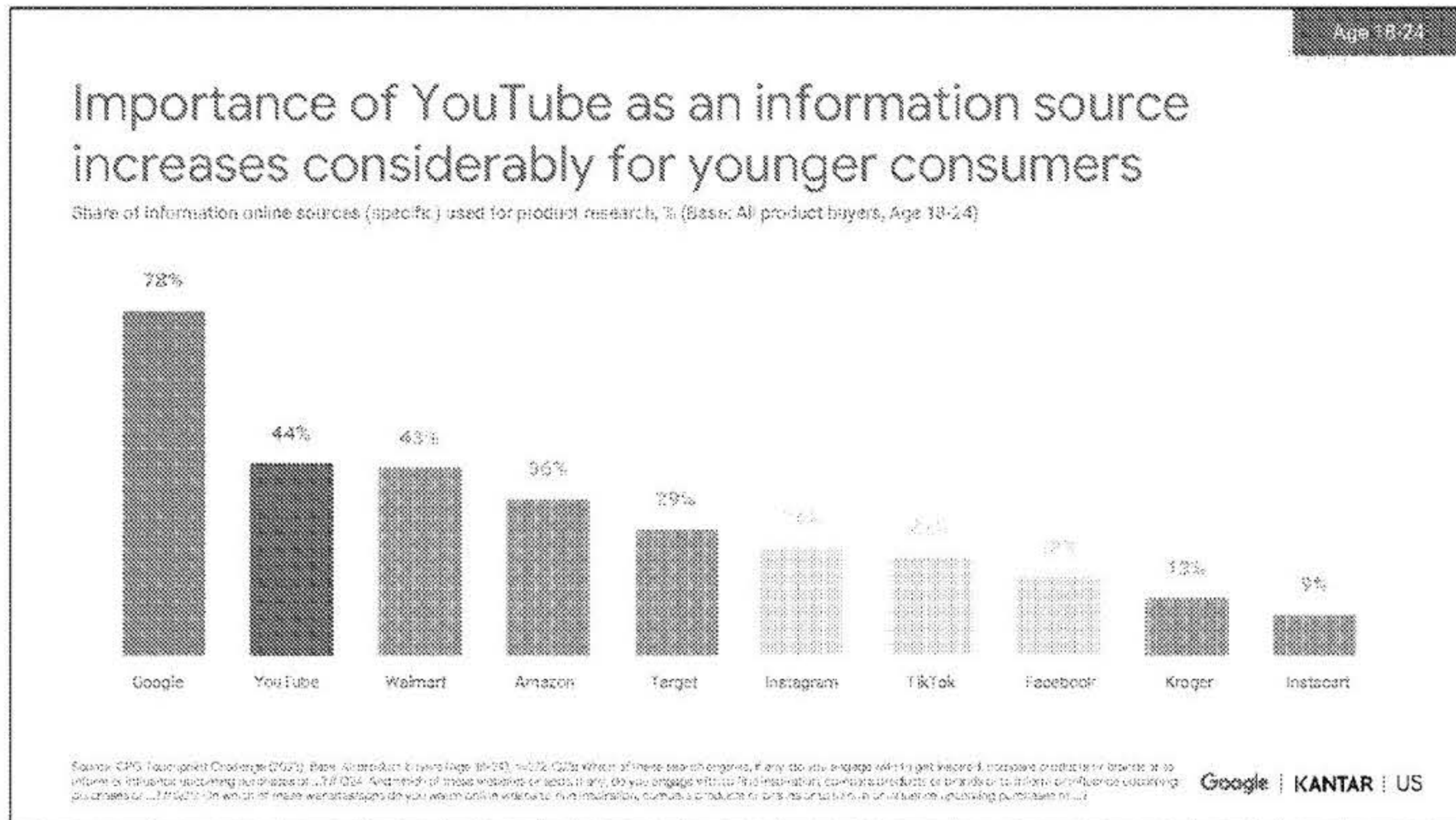
This information is avail for all categories.
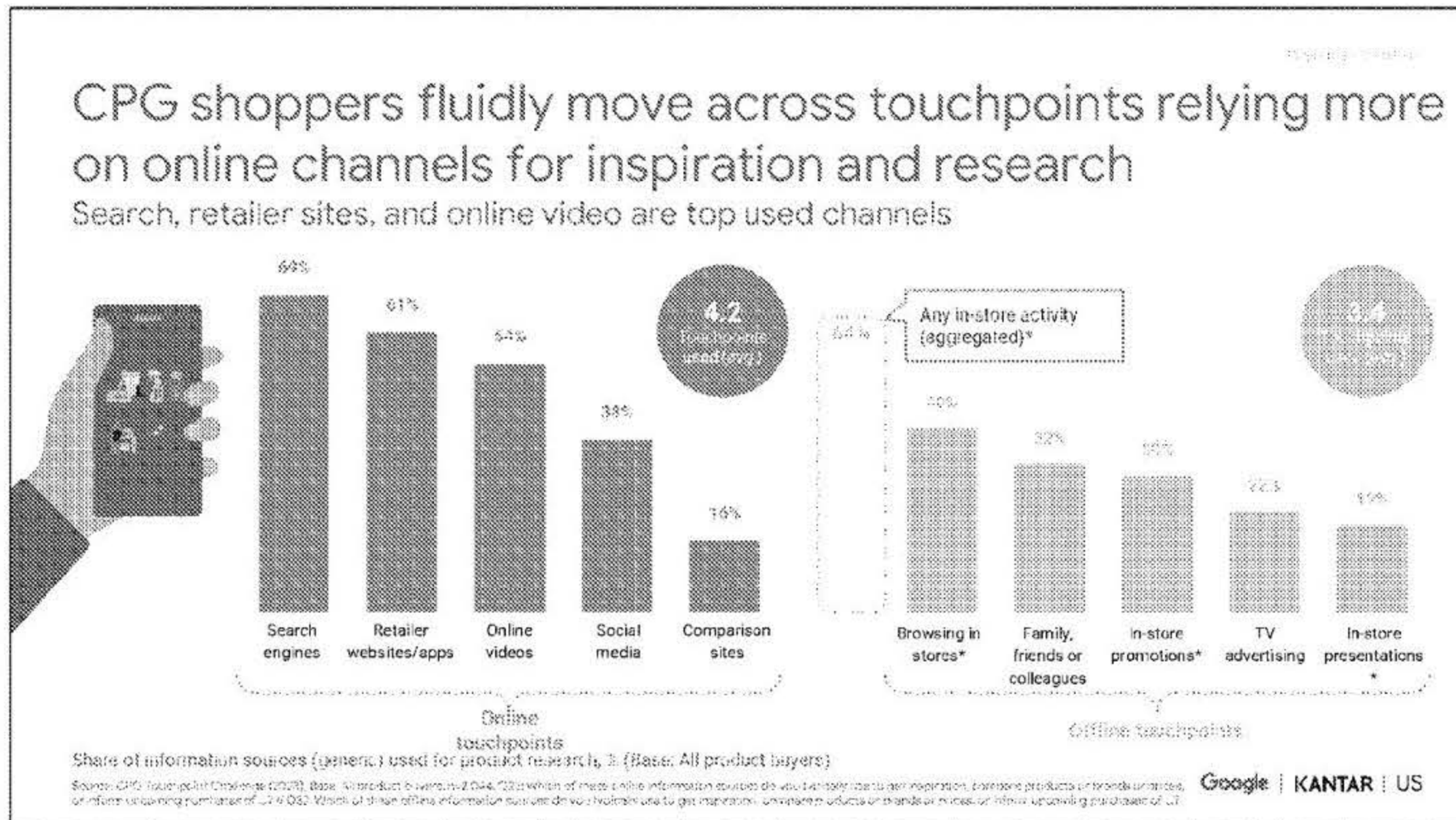
Ok so now that we have established that CPG is heavily researched, we want to understand how shoppers are researching. While shoppers rely on multiple sources, they turn more to online sources with Search engines most used followed by retailer sites/apps and Online Videos (well ahead of social).

Over 60% CPG shoppers rely on Google as the top online information source

Share of information online sources (specific) used for product research, % (Base: All product buyers)

Google | KANTAR | US

63% of shoppers rely on Google well ahead of other sources. Walmart tops Amazon - likely due to its expansive omnichannel and brick and mortar footprint.

GOOG-AT-MDL-008285916

Importance of YouTube as an information source increases considerably for younger consumers

Google maintains the top position for younger consumers. Younger consumers also rely on YouTube more as a top information source above retailer sites/apps and social channels. So again, while there is a lot of trade headlines on the rise of retail media and social commerce, shoppers turn to Google and YT more.

GOOG-AT-MDL-008285917

Shoppers rely on Google throughout the shopper journey using it as a gateway for purchasing online or offline

Amazon used for product comparisons and deals; YouTube used most for inspiration and trusted advice
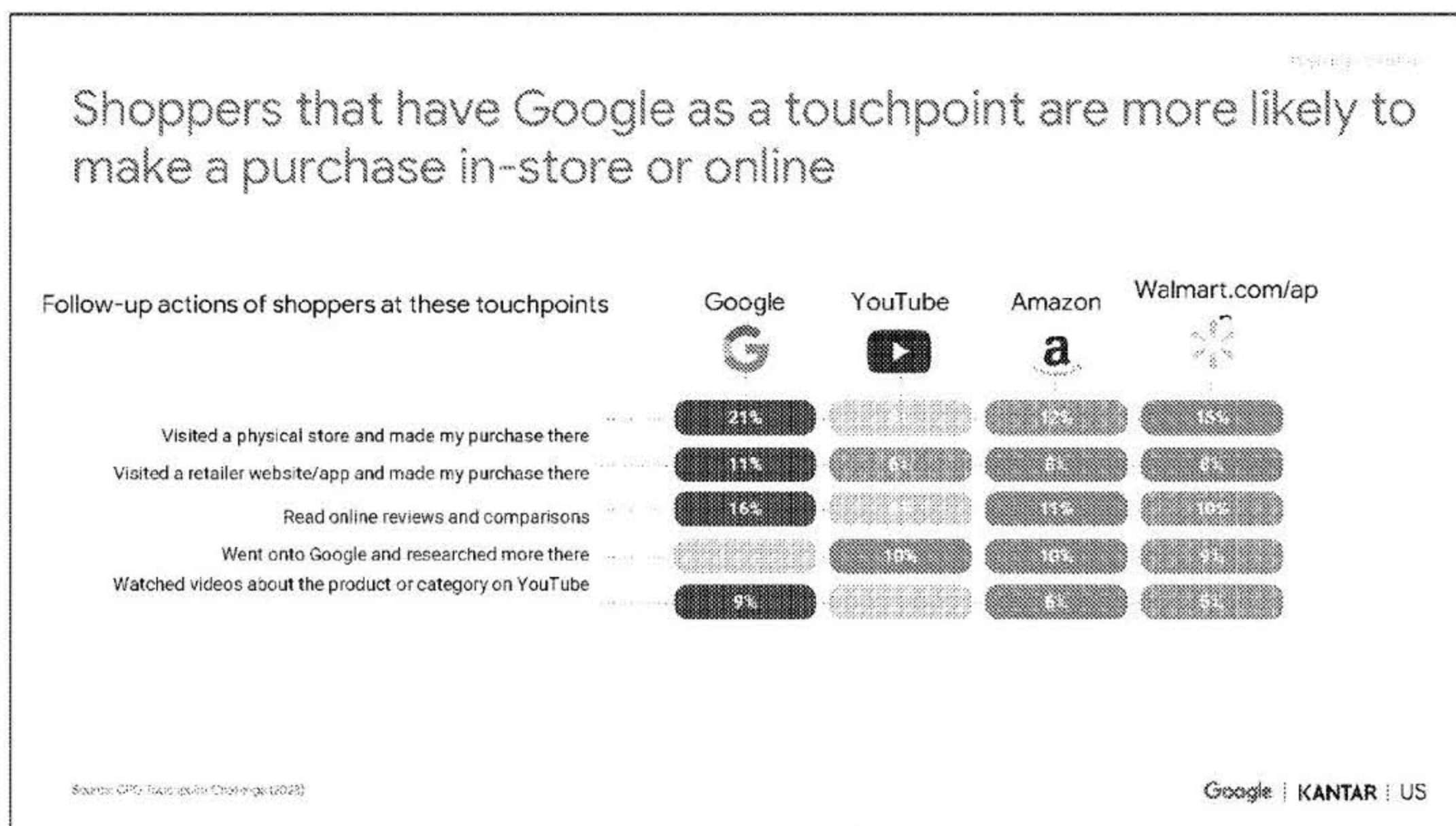
As we all know the shopper journey is not linear, and often now referred to within Google as navigating the Messy Middle where consumers are constantly bouncing between exploration and evaluation.

As we map shopping moments across Discovery, Research and Purchase, shoppers identified what they consider to be the most influential during those moments.

As you can see, Google shows up strongly throughout the shopper journey, especially for getting information and exploring brands, when seeking "trusted" reviews, and finding where to purchase whether that is offline or online - being the gateway to connecting brands and shoppers regardless of where they purchase.

YouTube ranks top for advice and how to tips, as consumers trust creators - after all 70% of consumers claim to purchase a product after seeing it on YouTube.
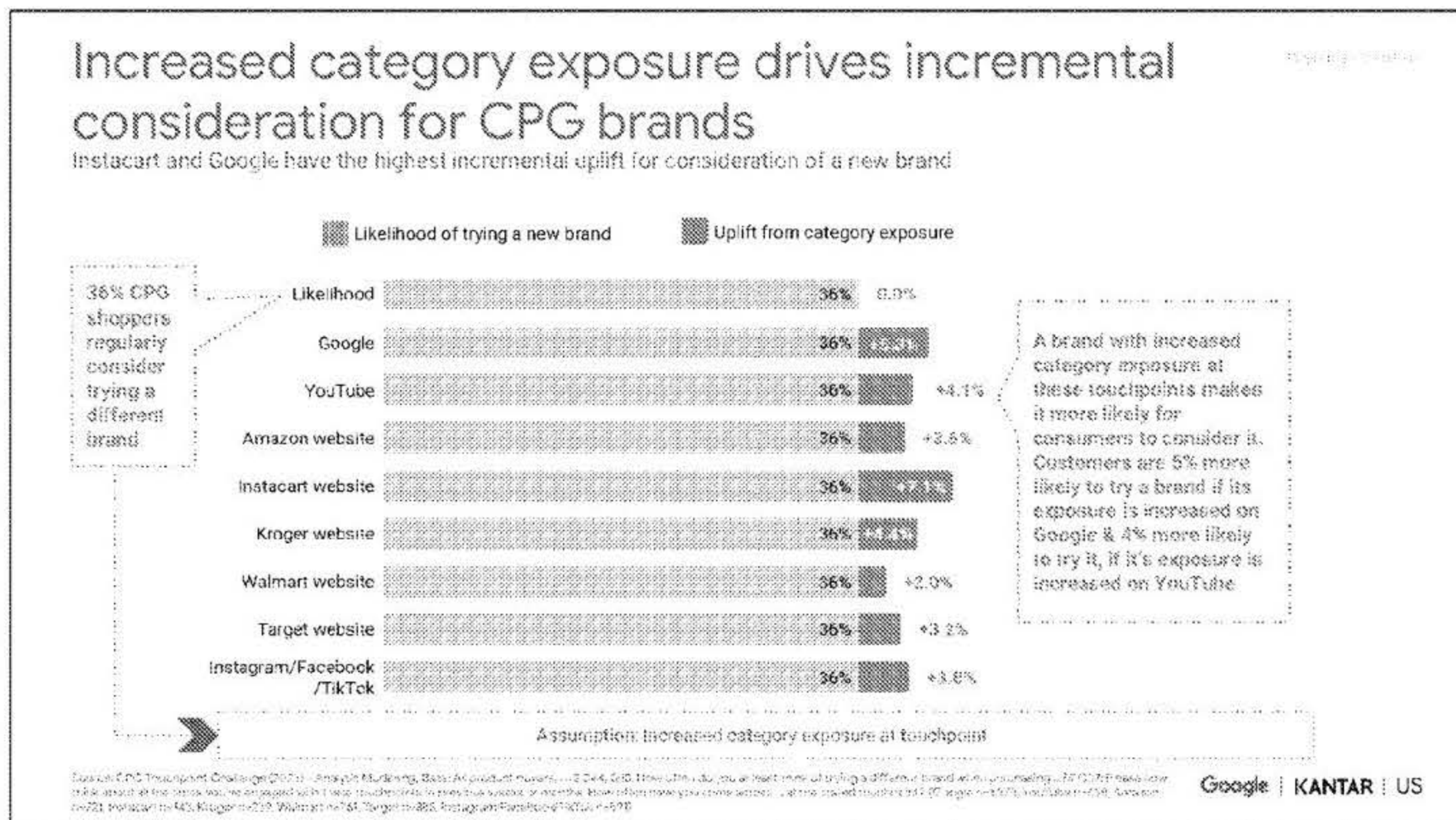
GOOG-AT-MDL-008285918

Google influence on brand consideration driven by its quality and reach over other media

Followed by Walmart (physical store), Amazon, Walmart.com and YouTube

Total influence index of Touchpoints (based on usage, frequency of exposure and quality)

Google | KANTAR | US

Influence here, is defined by (details on this slide):
Usage x Frequency x Quality = Influence Index

Google is the top information source for CPG shopper, but also the MOST INFLUENTIAL - Kantar consistently found across categories that a touchpoint's reach (usage along the journey) is an important KPI. Even when consumers have countless touchpoints at their disposal, they often don't take full advantage of them. In fact, too much information or too many choices leads to mental overload and causes even more focus on the most important touchpoints. But reach is not enough: we know that the frequency of use of a touchpoint is an important indicator for brands, as it quantifies the opportunities for brand interaction at the touchpoint level. And then there's the perceived quality of a touchpoint: If a consumer consistently perceives the content or information quality as poor, it is likely that they will pay less and less attention to it over time.

Alll three of these factors are used to create an Influencer Index. Google's influence on brand consideration is driven by its reach but also leadership in quality and trust in information.

Shoppers that have Google as a touchpoint are more likely to make a purchase in-store or online

Follow-up actions of shoppers at these touchpoints	Google	YouTube	Amazon	Walmart.com/ap
Visited a physical store and made my purchase there	21%		19%	15%
Visited a retailer website/app and made my purchase there	11%	6%	8%	8%
Read online reviews and comparisons	16%		11%	10%
Went onto Google and researched more there		10%	10%	9%
Watched videos about the product or category on YouTube	9%		6%	5%

Source: CPG Touchpoints Challenge (2023)

Google | KANTAR | US

Influence can also be determined by what follow up actions are taken as a result of an interaction.
Google is the glue in the "Messy Middle" journey where consumers are boucing between exploration and evaluation. Shoppers that have Google as a touchpoint make more purcahses instore, even when compared to shoppers that visit Walmart.com (6 points highter); and more eCommerce purcahses even when compared to Amazon (3 pts higher).
There is reason why Amazon and Walmart spend so much on Google search - because it drives eCommerce sales. Consumers are not going to one retailer app anymore, they are fluidly navigating across them to find the best deals, compare reviews - Google is the glue and the gateway to purchase actions.

Increased category exposure drives incremental consideration for CPG brands

Instacart and Google have the highest incremental uplift for consideration of a new brand

Lastly, A more frequent category engagement of shoppers at different online touchpoints can trigger new brand trial
Methodology to compute brand incremental uplift is based on % of shoppers who are open for new brand trial & Impact of higher frequent category exposure at a touchpoint on new brand trial (details on this slide) -
Over ⅓ of CPG shoppers are regualrly considering a new brand. The addition of Instacart has the highest impact on incremental brand consideration, followed by Google, Korger and YouTube.
Consumers are 5.3% more likely to try a brand with increased exposure on Google vs 3.5% more likely to try a new brand with increased exposure on Amazon.

Google is the glue that holds the shopper ecosystem together and gateway to omnichannel sales.

☑

Google is the top information source for CPG, and YouTube is #2 for younger consumers

☑

Google drives more in-store and eCommerce follow up actions than retailer sites, and YouTube drives more then Social channels.

☑

Added frequency on Google drives more incremental brand consideration than Amazon and Walmart

Google | **KANTAR** | US

Thank you!

For more tips, check out gollifehacks and gollearningontheloo

Bi-Weekly Agency Sales Meeting

March 13, 2023

Google

Agenda

12:05PM ET [10 min]
Leadership Top of Mind

12:15PM ET [5 min]
Rev Call Recap

12:20PM ET [10 min]
Meetings Leaderboard

12:30PM ET [10 min]
Quota Allocation Process w/ Chris

Matt

GOOG-AT-MDL-008285927

GOOG-AT-MDL-008285930

Leaderboard - Meetings

4.4 Meetings / Week	**14 of 32** ASLs above 5	**27 of 32** ASLs above 3

- How are you generating meetings? Any particular focus areas?

- How are the meetings going? Any big wins or big challenges?

- Are there challenges in getting meetings while agencies are under-resourced?

- How can we drive consistency in how we're logging meetings in Connect Sales?

	Mtgs / Week	QTD Meetings
Andres Valencia	9.7	100
Laura O'Connell	8.5	87
Catherine Brandon	8.1	83
Wendi Oppenheim	7.7	79
Sara Holcomb	7.4	76
Wendy Lopples	7.4	76
Matthew Anderson	7.3	75
Rachel Rasmusson	7.0	72
Rebecca Rittenberg	6.1	63
Vicky Fudali Dorost	6.1	63

Google

Quota Allocation Process w/ Chris

What if my quota doesn't seem right?

Parent-Level Allocations

Step 8 in previous slide

Piloting in Q3 2022, we'll reach out to pod leads on what the division / product-level allocations should look like for whole accounts within US Agency. This should alleviate instances where there are big gaps in your book based on how primarily pod leads allocate quotas at the parent-level.
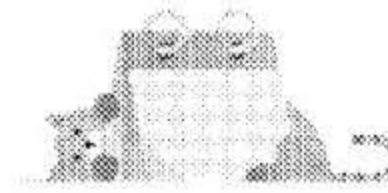
End of Quarter Adjustments

Step 10 in previous slide

In the event you submitted mapping changes and your quota is still off, you have the ability to request end of quarter changes in the trix at go/aa-adjustments. Note that you will not see these numbers reflected anywhere other than Post-Adjustment results sent out by Ads Finance and in go/mysalesbonus.

Google

GOOG-AT-MDL-008285935

When we provide adjustments

○

Agency does(n't) manage division / product

Common

Your account mapping is all the way up to date, but you still have quota / rev for parts of the business your agency doesn't manage

○

DV3 Seat Shared

Extremely Rare

Instances where there is a single DV3 instance split between two agencies managing the same advertiser.

○

Incorrect Service Channel

Extremely Rare

If an account ends up mapped incorrectly into GCS though the advertiser is an LCS client.

The prerequisites for ANY of the above adjustments to happen are:

1) you have confirmed with the Agency Pod receiving the revenue / quota (Primary Pod if Direct),

2) you attempted to obtain the correct mapping for your book of business and the shift still did not occur, and

3) the net effect of your adjustments is >0.1% of pod EGQx

Failure to do either of the above means your adjustment will NOT be processed.

Google

What are some examples of these adjustments?

Category	Example	Action for ASL	Approved by SF?
Agency doesn't manage division/product area	You realize that this quarter, your OpCo renewed the entirety of the quota for Big Tox Inc. but your OpCo only manages their YouTube spend.	Make sure your mapping is accurate and up-to-date and verify if your account still carries quota for a business that it doesn't manage.	This would be approved by SF as that non-YouTube quota should not be with an OpCo that doesn't manage it.
Agency doesn't manage division/product area	Yesterday, you read that the OpCo you manage lost the Search business for the advertiser XYZ Tech Co. They carried $700k in Search quota.	Make sure your mapping is accurate and up-to-date. That said, a change to the management of spend on the account during the quarter will not be addressed via adjustment.	This would not be approved by SF as changes to the business that happen during the quarter are not eligible for adjustments.
Disproportionate quota	As you are looking at the performance of the advertisers in your OpCo end of quarter, you notice CarCo Inc. had 95% attainment while in the primary pod they had 94% attainment.	Same as above. That said, it may be that the accounts that an agency owned simply underperformed relative to the overall parent account.	This would not be approved by SF as having quota more than the broader parent account isn't enough reason to prove any inaccuracy in target.
DV3 Seat Shared	Your client, ABC Financial, has a special situation where an instance of DV360 is shared between your OpCo and another.	There's been one such instance of this in the past that results in a recurring adjustment. Let SF know if a similar situation is happening with one of your advertisers.	This would be approved by SF as it is a systemic issue that couldn't be rectified by correct mapping alone.
Incorrect Service Channel	VideoStream, now signed a direct SV contract that was mapped to your OpCo but the sign post ID did not populate as it appears as GCS.	There situations are also few and far between, but in these instances, it the parent is actually GCS and is incorrectly mapped as GCS, raise to quota-adjustments, with link to a screenshot of ConsoleSales.	This would be approved by SF as that spend should be associated with an ICS parent.

Each of the above actions should come after verifying the three criteria outlined in the last slide.

Google

More examples can be found here

FAQs

1   Q: What are adjustments meant for?
Adjustments are meant for instances where systems limitations prevent XP from accurately reflecting the quota / revenue that your agency manages.

2   Q: Can I have the adjustment processed at the start of the quarter so that the data is accurate in our reporting?
No - we can't update the underlying datasets for these specific nuances. Adjustments are strictly for comp, not reporting purposes.

3   Q: When can I submit requests?
I'll update go/ae-adjustments with the trix for the current quarter at the start of the last month of quarter.

4   Q: Who can I contact with questions on the process?
Reach out to @lawchristopher

Google

Team Dentsu

Leadership Top of Mind
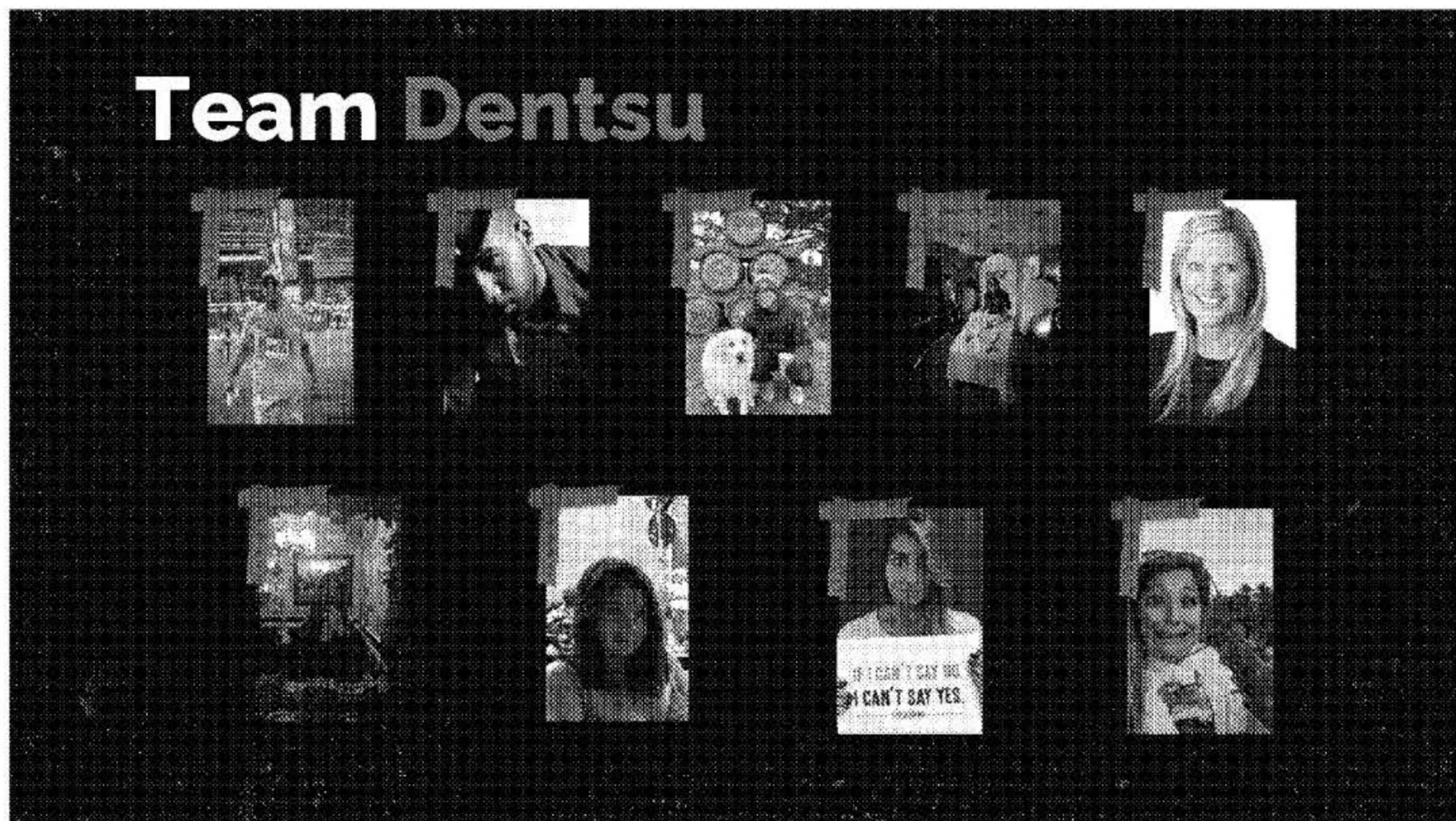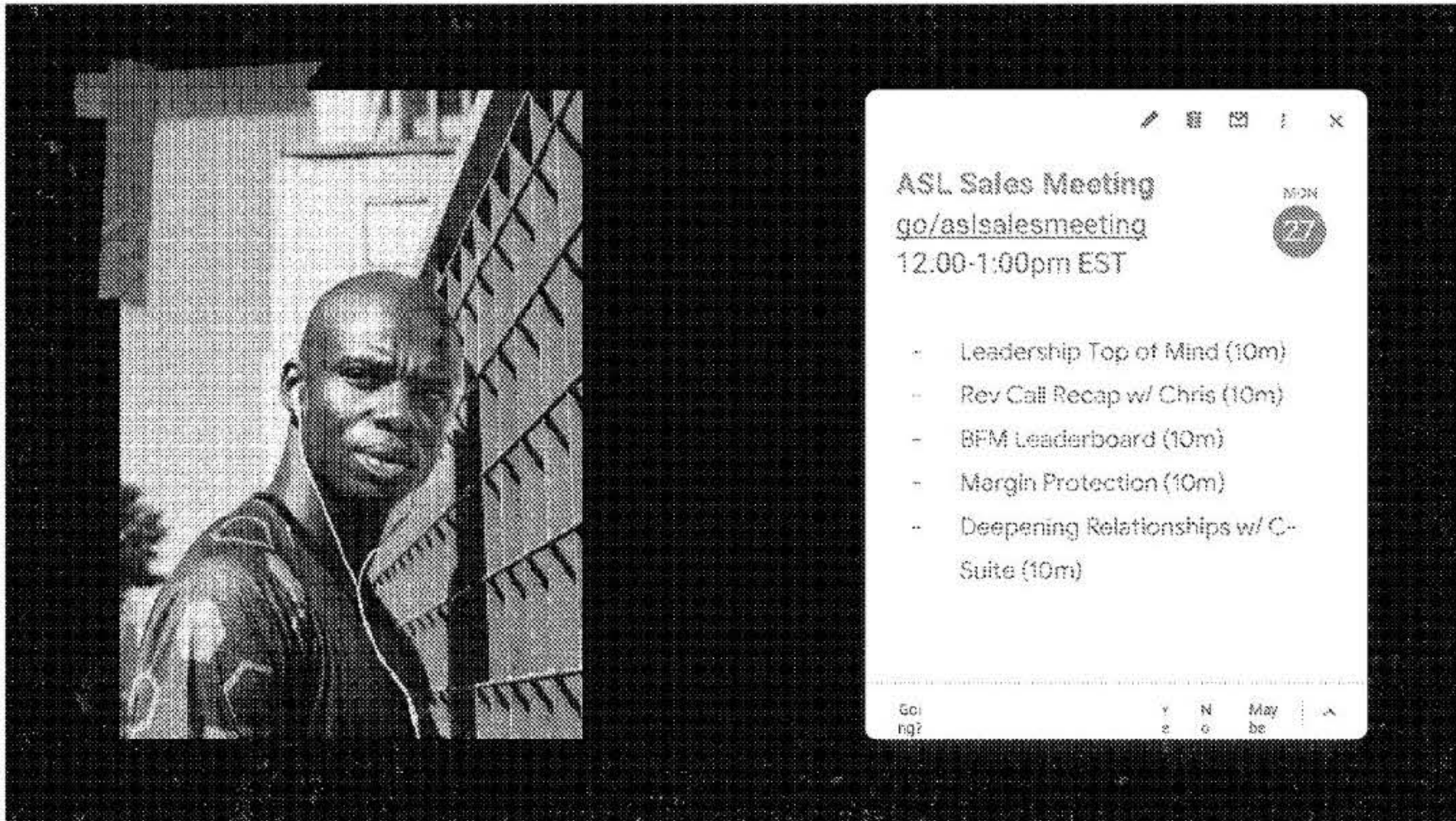
Black History Month Fun Fact: **Every Black History Month has a theme.**

Each year an American president endorses a specific theme for Black History Month. In 2023, the theme is Black Resistance, which recognizes "historic and ongoing oppression, in all forms, especially the racial terrorism of lynching, racial pogroms, and police killings," according to The Association for the Study of African American Life and History**.**
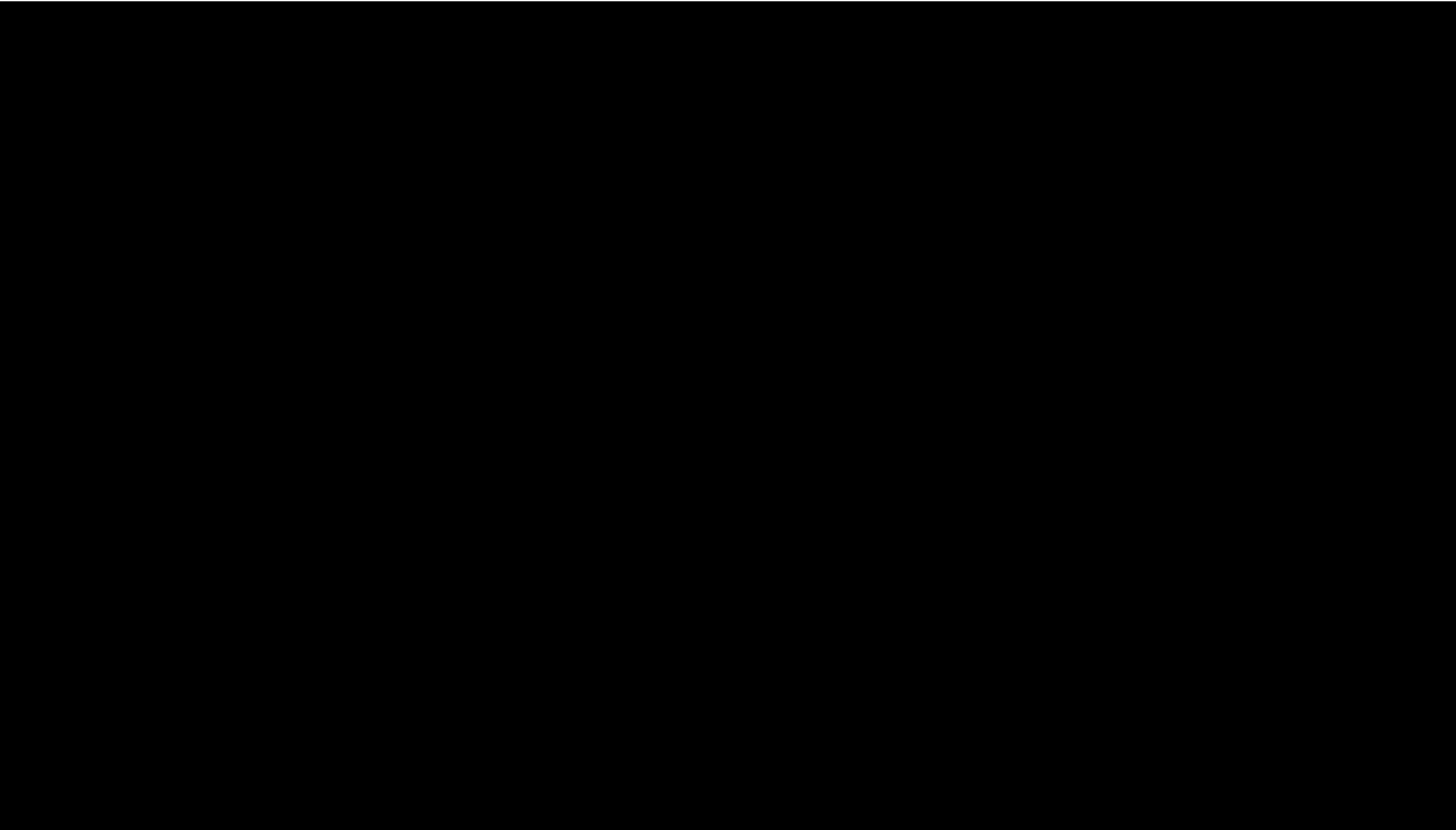
Previous Black History Month themes include Black Health and Wellness, African Americans and the Vote, The Crisis in Black Education, and The Black Family: Representation, Identity and Diversity.

Rev Call + Mid Quarter Call

GOOG-AT-MDL-008285946

YOU GOTTA BE

BAD	BOLD	WISER
HARD	TOUGH	STRONGER
COOL	CALM	STAY TOGETHER
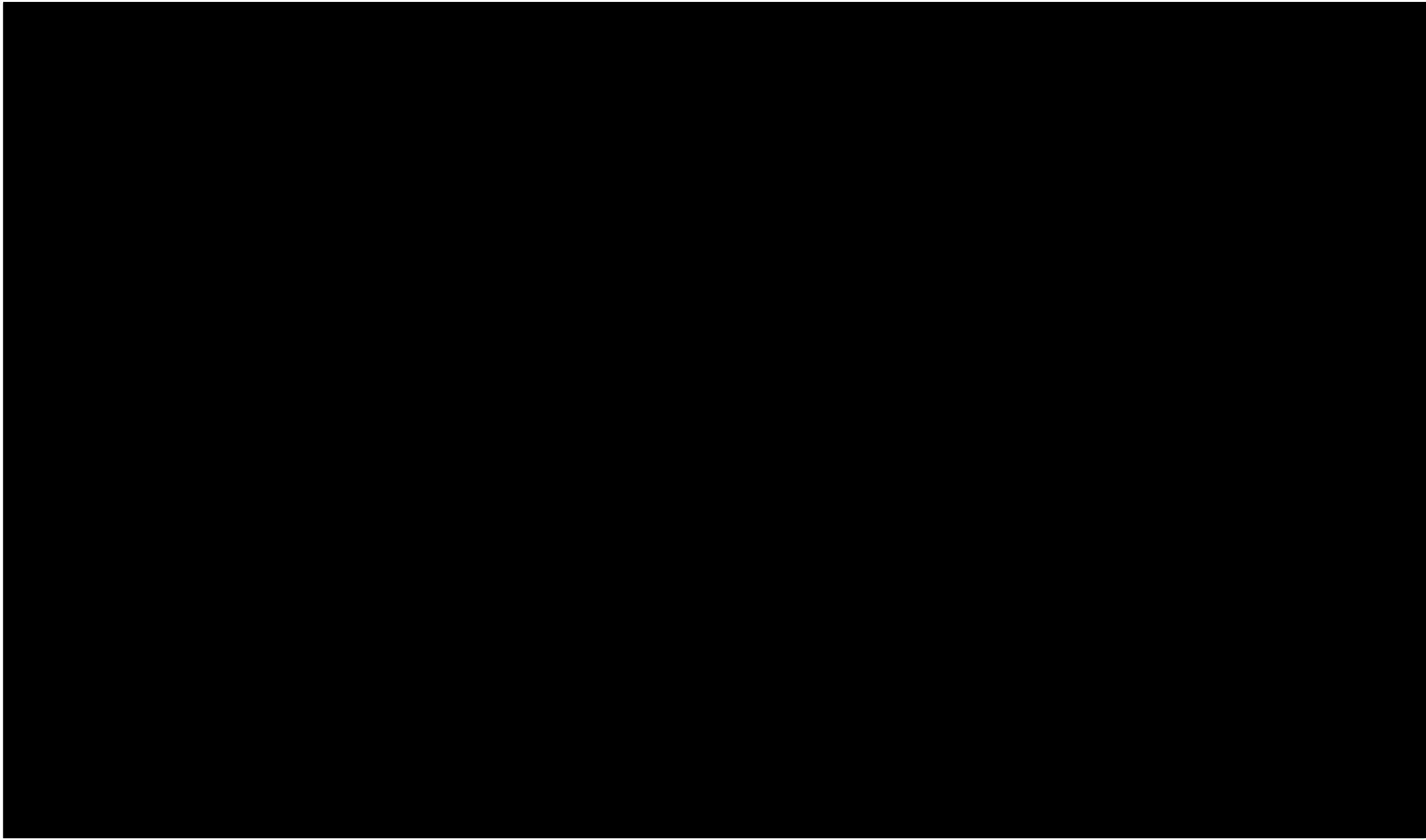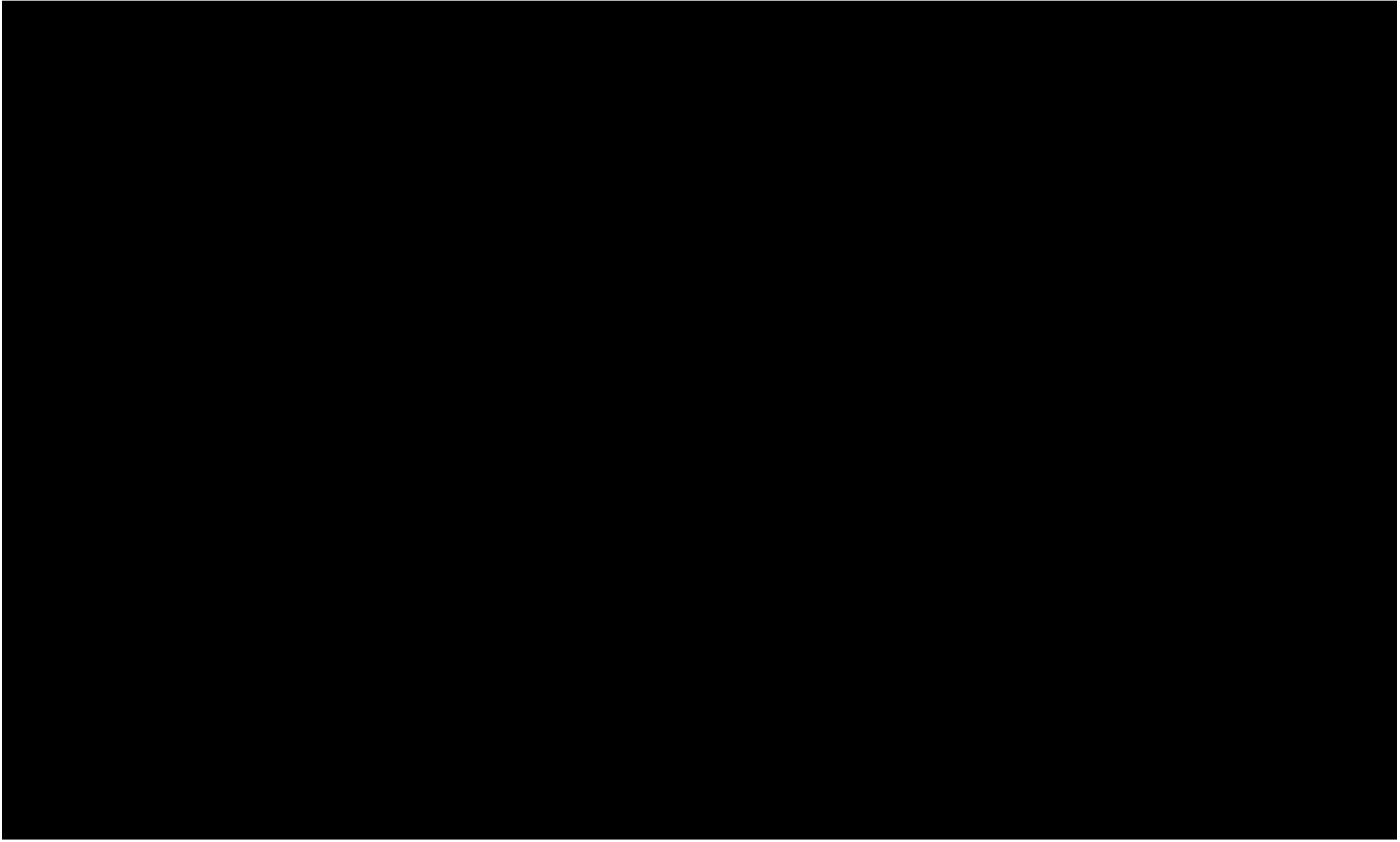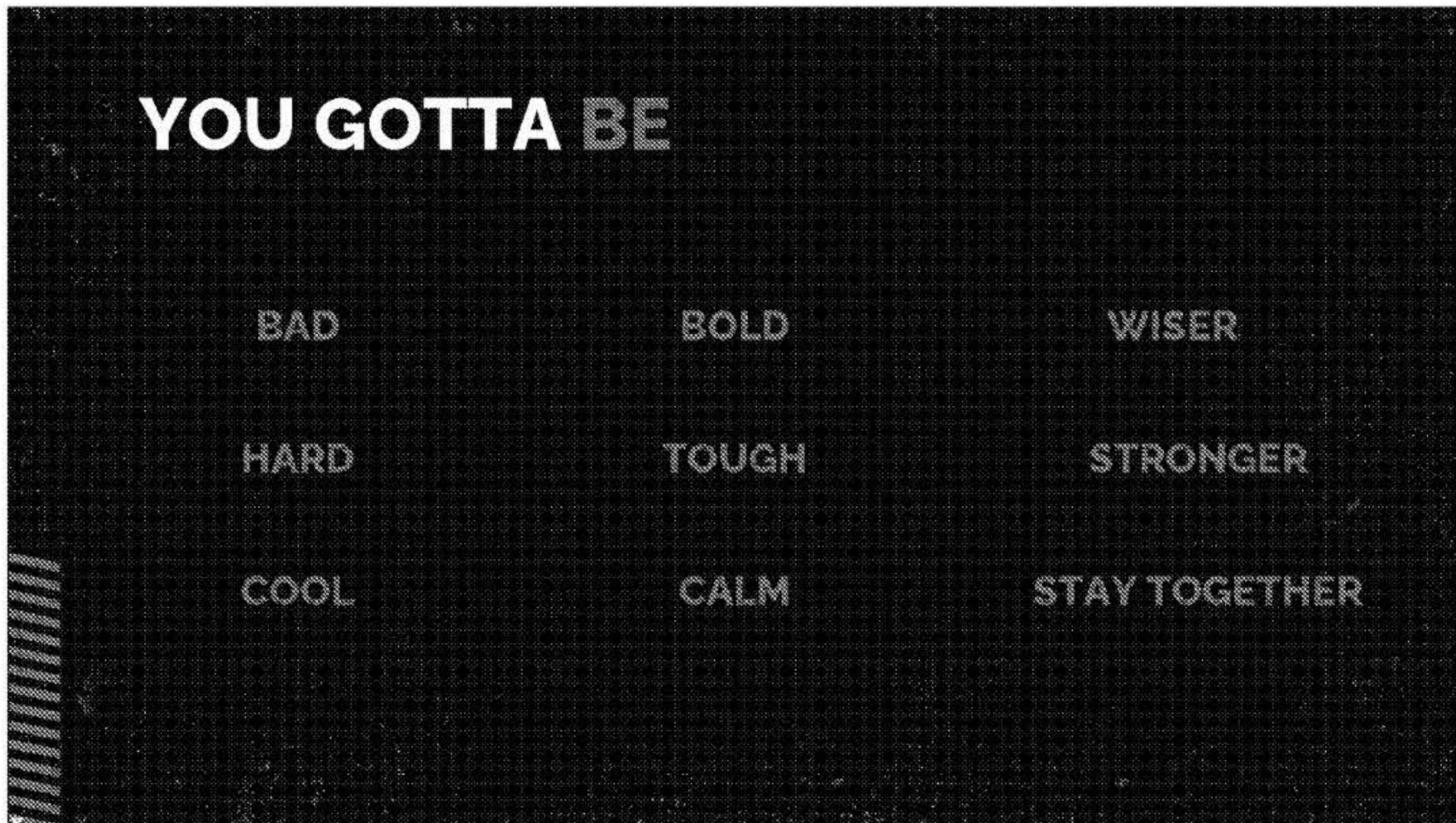
Encourage everyone to type a word in the chat on who YOU gotta be for your team, for your agency, and for your family.
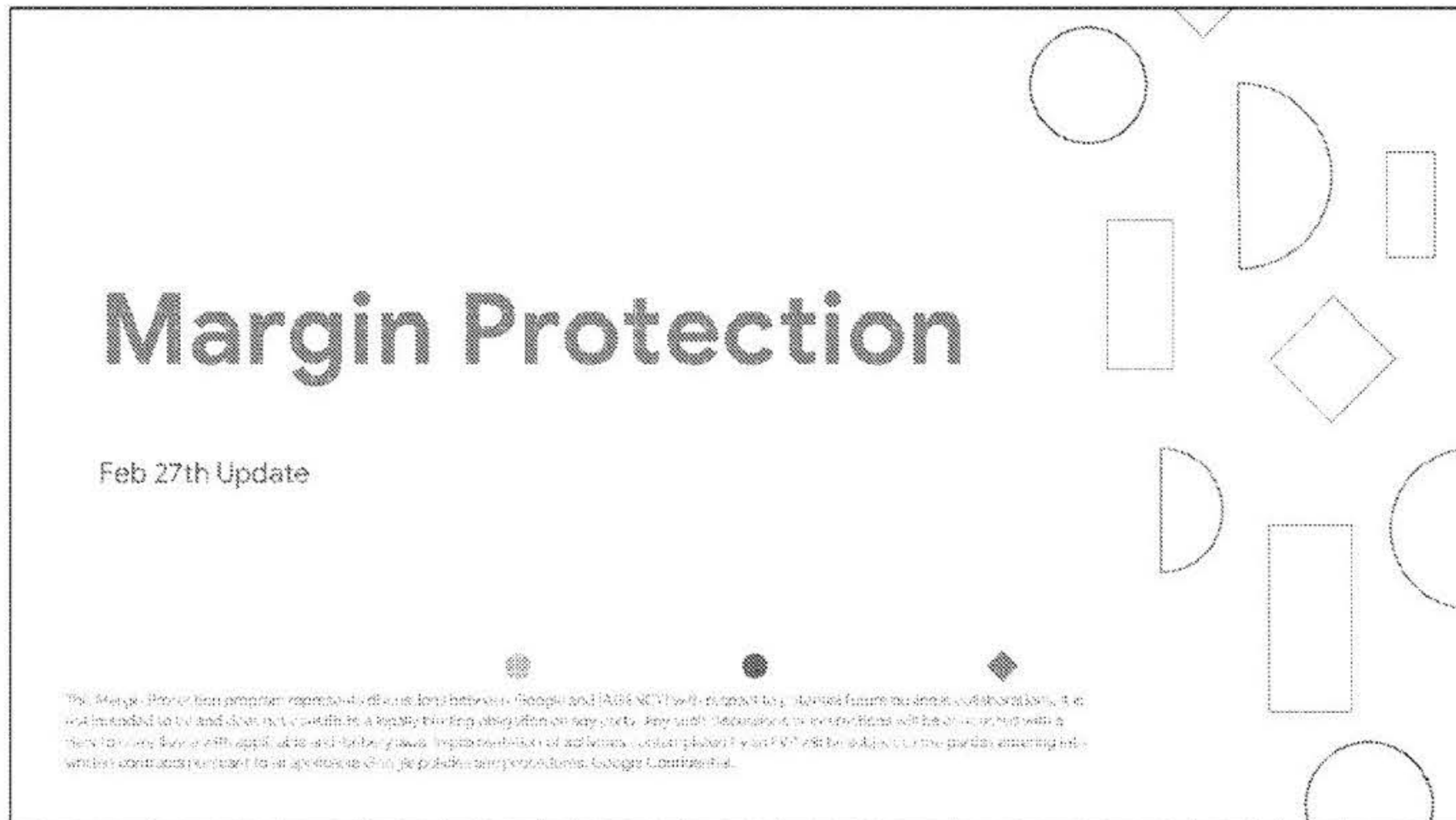
BFM Leaderboard

OKR Leaderboard

This week's OKR is... Search Coverage!

- What approaches have you seen work with your agency to drive Broad Match adoption?

- What best practices can you share with your fellow ASLs?

Google

GOOG-AT-MDL-008285952

Margin Protection

Margin Protection

Feb 27th Update

Welcome everyone to the 2023 FVP meeting. We are happy you're here. There are a lot of people on the call and we will get to intros but I first want to give everyone a reminder of why we're meeting today. We are going to walk through our proposal of our 2023 partnership plan. We want to align on goals and discuss the strategy and tactics involved to reach those goals, so that you walk out of this meeting today knowing the three main things you can expect out of your partnership with Google this year. Does that sound good?

We're rolling pretty deep on the Google side and I'll let most folks introduce themselves throughout the meeting but we do have two of our leaders on the call I wanted to introduce before we jump into the deck.

YAY! My agency is interested in a margin protection program. **What now?**

On behalf of our entire team - thank you for a great 2022. We accomplished a lot together in all three of our strategic pillars.

We increased investment ■ YoY, demonstrating solid ROI for your clients and tightening up our media KPIs and workflow. Given Q4 and the pullbacks and savings exercises a few of your largest clients went through, this is still a very healthy number.

We completed 27 tech maturity projects, which we will get into later in the deck

And we had big wins on the culture and innovation side of things, fully completing all of our initiatives, including two Rxcellence Awards, the HealthFront sponsorship and the 8th annual Healthcare Search Summit

First, keep in mind that you can find just about everything you
need at **go/marginprotection**

GOOG-AT-MDL-008285956

The Margin Protection Program has two main tracks

Product Track.

Re-establish agency best practices by workshopping and leveraging existing, native tools found across all Google platforms

Tech Track.

Partner with our gPS teams to implement custom, automated solutions for individual clients.

Product Track. ~60% of errors can be addressed with tools **already available in our platforms**. ASLs, PAAMs, GMP and Specialist teams can customize a workshop based on their most common errors, by platform

Planning & Budgeting

Forecasting, setting the correct amount of spend and pacing on target for each channel, campaign, audience and outcome.

Activation

Create campaigns, traffic assets, configure targets, brand controls, flight dates, match types, and exclusions.

Measurement

Create and place tags, Validate landing page and tracking templates.

Monitor **performance data,** collect learnings and **test** new hypothesis.

*A fully customizable deck is available at go/MarginProtection to help you develop your workshop*

Tech Track. Partner with our gPS teams to implement custom, automated solutions for individual clients.

This track is next-level and meant to supplement the Product Track.

It includes solutions across all Google products, focusing on pre and post-launch QA, and performance monitoring with anomaly detection.

If your client is interested in the Tech Track, connect with your gPS lead to schedule a discovery meeting.
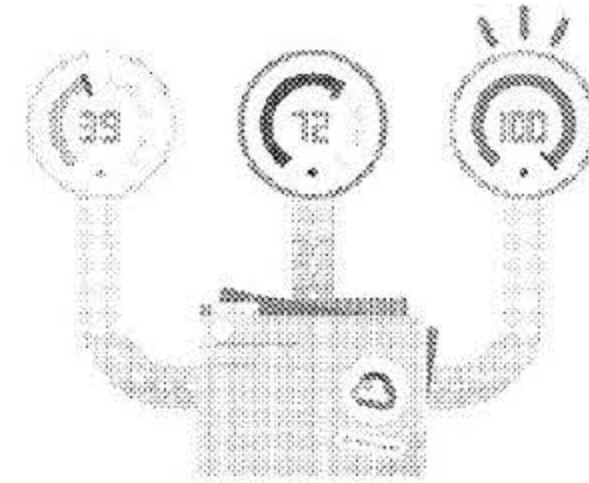
A list of all available gPS solutions is available at go/MarginProtection

GOOG-AT-MDL-008285959

Alright – **I get it.** But this seems like kind of a lot to explain to my client. Do you have a nifty lil' deck that sums all this up in a concise, articulate way?
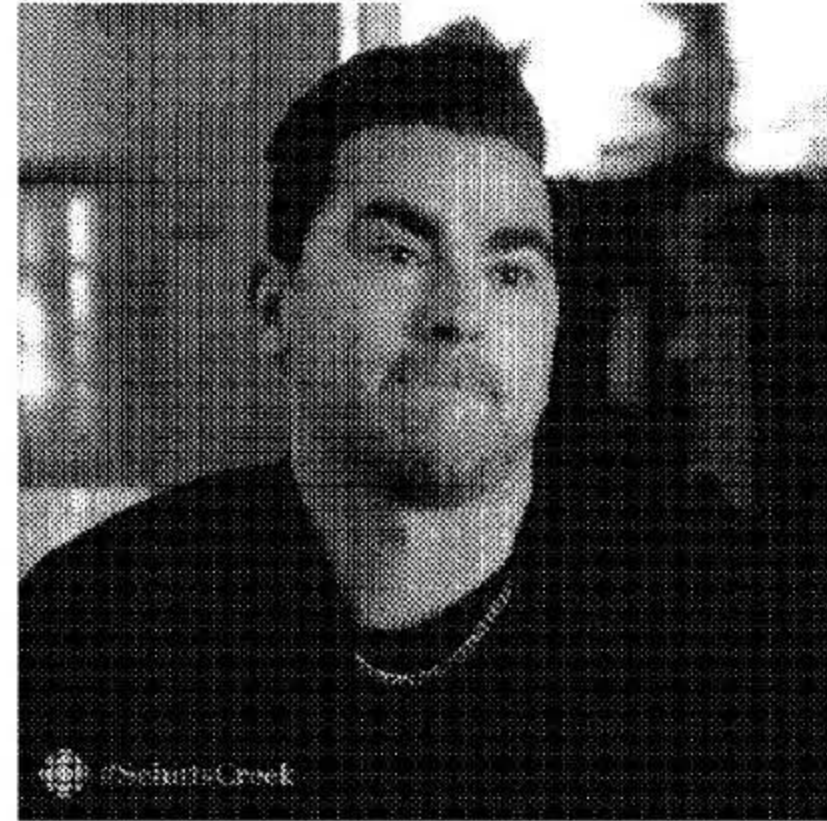
Yes we do! And you can find it at go/MarginProtection

Thank you!

Here's to fewer whoopsidaisies in 2023.